

## Retirement - Employee Enrolled Into Wrong Plan

PA30

### Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
7/07/06	Lesa Terry	Draft
8/10/06	Lesa Terry	SME Updates
8/16/06	Lesa Terry	SME Final Version

### Purpose

Use this procedure to correct the employee's record when they have been enrolled into the wrong retirement plan.

### Trigger

Perform this procedure when:

- An employee's past work history requires them to be reported in another retirement plan.

### Prerequisites

- Employee qualifies for the plan enrollment.

### Menu Path










Human Resources → Personnel Management → Administration → HR Master Data → Maintain

### Transaction Code

**PA30**

### Helpful Hints

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
<b>Error</b> 	<b>Example:</b>  Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to proceed.
<b>Warning</b> 	<b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.


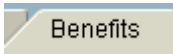
## Procedure

1. Start the transaction using the menu path above or transaction code **PA30**.

### Maintain HR Master Data



2. Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. <b>Example:</b> 99991000

3. Click  (Enter) to validate the information.
4. Click the  tab.

## Maintain HR Master Data

The screenshot shows the SAP 'Maintain HR Master Data' window for employee SMITH JOHN (Personnel no. 99991000). The 'Overview' tab is active, displaying various data fields. In the 'Benefits' section, 'Savings Plans' is highlighted with a green checkmark in the selection column. The 'Period' section shows options for selecting a time range, with 'Today' and 'Curr. week' selected. The 'Direct selection' section shows 'Infotype' as 'STy'.

5. Click the gray box to the left of  to select.
6. Click  (Overview) for an overview of all actions associated with the **Savings Plans** (0169) infotype.


## List Savings Plans

The screenshot shows the SAP 'List Savings Plans' interface. At the top, the SAP logo and menu bar are visible. Below the menu bar, the title 'List Savings Plans' is displayed. On the left, there is a 'Find by' section with options: 'Person', 'Collective search help', 'Search term', and 'Free search'. The main area displays employee data for 'SMITH JOHN' (Personnel No. 99991000). Below this, a table lists savings plans. The first row is highlighted with a red box, showing 'E3FSSERS 3 - Rate F - Self' with a start date of 07/01/2006 and an end date of 12/31/9999. The second row shows 'PERS 1' with a start date of 06/01/2006 and an end date of 06/30/2006. At the bottom right, there is a 'Change (F6)' button and a 'Page 1 of 2' indicator.

Start Date	End Date	Type	Text	Plan Text	Lot
07/01/2006	12/31/9999	401A	401(a)	E3FSSERS 3 - Rate F - Self	
06/01/2006	06/30/2006	401A	401(a)	PERS 1	



This employee is currently enrolled in School Employee's Retirement System (SERS) Plan 3 and should have been enrolled in Public Employee's Retirement System (PERS) Plan 3.

7. Click the gray box to the left of the current record where the end date is 12/31/9999 to select.
8. Click  (Change) to change the record.

## Change Savings Plans

The screenshot shows the SAP 'Change Savings Plans' transaction. The top bar includes the SAP logo and standard menu options (Info type, Edit, Goto, Extras, System, Help). The title bar reads 'Change Savings Plans'. On the left, a 'Find by' sidebar lists search options: Person, Collective search help, Search term, and Free search. The main area displays employee data for SMITH JOHN (Personnel No. 99991000). Below this, the 'Plan' field is set to 'E3FS SERS 3 - Rate F - Self'. A tabbed interface shows 'Plan data' as the active tab. Under 'General plan data', the 'Benefit area' is 'US USA', 'Plan type' is 'SERS 3 - Option F', and 'Benefit plan' is 'E3FS SERS 3 - Rate F - Self'. The 'E3FS' code is highlighted with a red box. The 'Planning Parameters' section shows 'EE Contr. Variant' as 'SR3F SERS 3 - Option F' and 'ER Contr. Variant' as 'SR3F SERS 3'. The 'Additional fields' section at the bottom shows 'Plan Choice Code' as an empty field.

Personnel No.	99991000	Name	SMITH JOHN
PersArea	3012 Lakeland Village	EEGroup	H Non-Perm. Limited
PSubarea	00JA Institutions	EESubgroup	03 H-OT Elig>Daily Sche Status Active
Start	07/01/2006	to	12/31/9999 Chng 07/10/2006 80042580
Plan	E3FS SERS 3 - Rate F - Self		

Plan data | Administration | Regular contrib. | Bonus contribution | Benefic...

General plan data


Benefit area	US USA
Plan type	SERS 3 - Option F
Benefit plan	E3FS SERS 3 - Rate F - Self

Planning Parameters

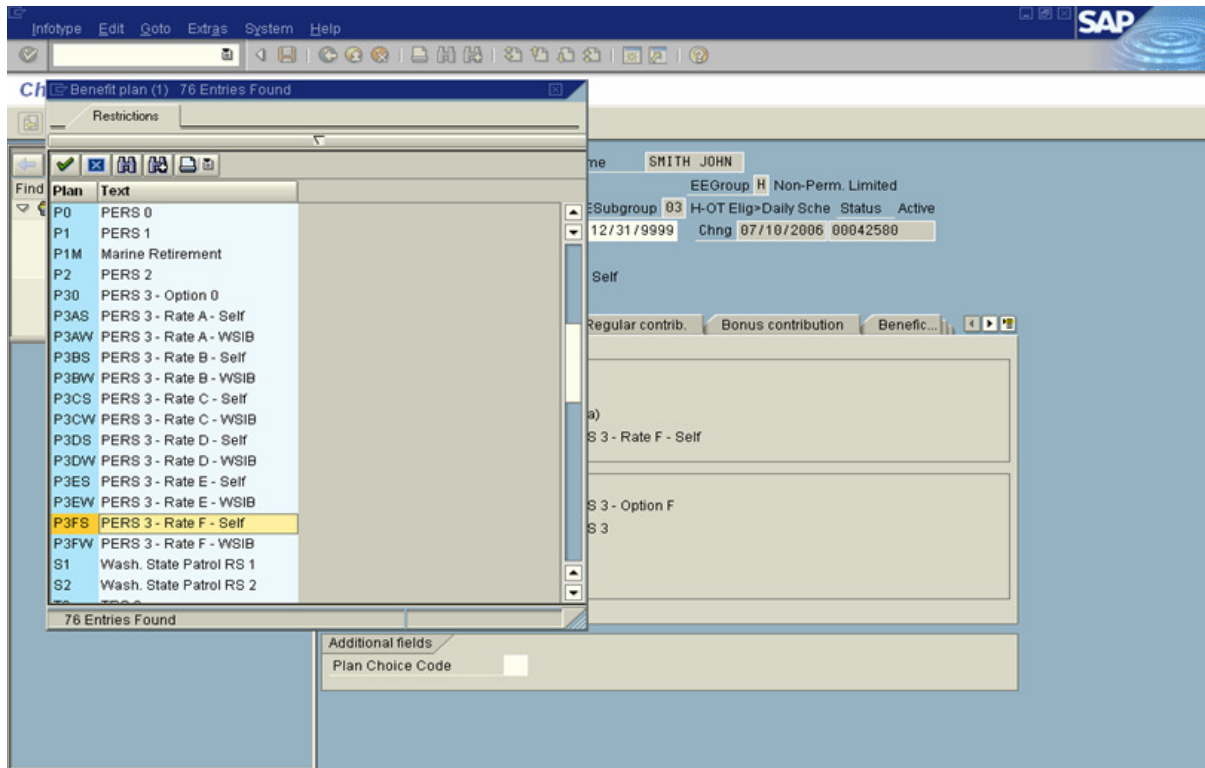
EE Contr. Variant	SR3F SERS 3 - Option F
ER Contr. Variant	SR3F SERS 3
Vesting rule	
Investment Group	

Additional fields

Plan Choice Code	
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9. Click in the **Benefit Plan** field. Click the  (Matchcode) to open the selection list.

### Benefit Plans (1) 76 Entries Found



The screenshot shows the SAP HRMS interface. At the top, there's a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below it is a toolbar with various icons. The main window is titled 'Benefit plan (1) 76 Entries Found'. On the left, there's a 'Find' list with columns 'Plan' and 'Text'. The list includes entries like P0, P1, P1M, P2, P30, P3AS, P3AW, P3BS, P3BW, P3CS, P3CW, P3DS, P3DW, P3ES, P3EW, P3FS, P3FW, S1, and S2. The entry 'P3FS' is highlighted. On the right, there's a form for 'SMITH JOHN' with fields for 'EEGroup' (H), 'Non-Perm. Limited', 'Subgroup' (03), 'H-OT Elig>Daily Sche Status' (Active), '12/31/9999', 'Chng' (07/10/2006), and '00042500'. Below this, there's a 'Self' section with tabs for 'Regular contrib.', 'Bonus contribution', and 'Benefic...'. The 'Regular contrib.' tab is active, showing a list of plans: 'S 3 - Rate F - Self', 'S 3 - Option F', and 'S 3'. At the bottom, there's an 'Additional fields' section with a 'Plan Choice Code' field.


10. Click the correct retirement plan.

Example: P3FS

11. Click  (Copy) to continue.

## Change Savings Plans

The screenshot shows the SAP 'Change Savings Plans' interface. At the top, there's a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is titled 'Change Savings Plans' and contains a search bar on the left with options like 'Person', 'Collective search help', 'Search term', and 'Free search'. The right side displays employee data for 'SMITH JOHN' (Personnel No. 99991000). The data includes 'PersArea 3012 Lakeland Village', 'EEGroup H Non-Perm. Limited', 'PSubarea 00JA Institutions', 'EESubgroup 03 H-OT Elig Daily Sche', and 'Status Active'. The 'Start' date is '07/01/2006' and the 'to' date is '12/31/9999'. The 'Plan' is 'P3FS PERS 3 - Rate F - Self'. Below this, there are tabs for 'Plan data', 'Administration', 'Regular contrib.', 'Bonus contribution', and 'Benefic...'. The 'Plan data' tab is active, showing 'General plan data' (Benefit area: US USA, Plan type: 401A 401(a), Benefit plan: P3FS SERS 3 - Rate F - Self) and 'Planning Parameters' (EE Contr. Variant: SR3F SERS 3 - Option F, ER Contr. Variant: SR3F SERS 3, Vesting rule, Investment Group). At the bottom, there's a status bar with a warning icon and the text 'Enter data for payroll past (retroactive accounting)', a date 'RD0 (1) (201)', and a user 'ssvaphrddedci OVR'.

12. Click  (Enter) to validate the information.



Warning message – Because you are correcting an improper enrollment, a retro-active enrollment will process to back-out the improper contributions to SERS and re-allocate the contributions to PERS.

13. Click  (Enter) to acknowledge the warning message.



## Change Savings Plans

Personnel No. 99991000 Name SMITH JOHN  
PersArea 3012 Lakeland Village EEGroup H Non-Perm. Limited  
PSubarea 00JA Institutions EESubgroup 03 H-OT Elig-Daily Sche Status Active  
Start 07/01/2006 to 12/31/9999 Chng 08/10/2006 STEVENM  
Plan P3FS PERS 3 - Rate F - Self

Plan data Administration Regular contrib. Bonus contribution Benefic...

Pre-tax contribution  
Amount 0.00 USD  
Percentage 15.00  
Units 0  
☐ Pre-Tax Rollover

Post-tax contribution  
Amount 0.00 USD  
Percentage 0.00  
Units 0  
☐ Start Post-Tax Contributions Immediately


Reference period for contributions  
Period 2 Semi-monthly


Additional fields  
Plan Choice Code

Save your entries RD0 (1) (201) ssvaphrddci OVR

14. Click on the **Regular contrib.** tab.
15. Verify the contribution percentage is correct.



If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 5) and press the enter button on your keyboard. You will receive an  Error message in the status bar telling you what the correct contribution percentage is for the selected plan.

16. Click  (Save) to save.


## List Savings Plans

The screenshot shows the SAP 'List Savings Plans' screen. The top bar includes the SAP logo and standard menu options. The left sidebar contains search options: 'Person', 'Collective search help', 'Search term', and 'Free search'. The main area displays employee data for SMITH JOHN (Personnel No. 99991000) and a table of savings plans. The table has columns for Start Date, End Date, Type, Text, Plan, and Lot. The first row shows a plan 'P3FSPERS 3 - Rate F - Self' starting on 07/01/2006 and ending on 12/31/9999, which is highlighted with a red box. The second row shows 'P2 PERS 2' starting on 06/01/2006 and ending on 06/30/2006. The bottom status bar indicates 'Record changed' and 'RD0 (1) (201)'.

Start Date	End Date	Type	Text	Plan	Lot
07/01/2006	12/31/9999	401A	401(a)	P3FSPERS 3 - Rate F - Self	
06/01/2006	06/30/2006	401A	401(a)	P2 PERS 2	



The employee is now enrolled in the proper retirement system and plan.

17. Click  (Back) to return to the previous screen.

## Maintain HR Master Data

The screenshot shows the SAP HR Master Data maintenance interface. The top bar includes the SAP logo and menu options like 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. Below the bar, the title 'Maintain HR Master Data' is displayed. The main area is divided into several sections. On the left, there is a 'Find by' section with options: 'Person', 'Collective search help', 'Search term', and 'Free search'. The central area displays employee data for 'Personnel no. 99991000', 'Name SMITH JOHN', 'PersArea 3012 Lakeland Village', 'PSubarea 00JA Institutions', 'EEGroup H Non-Perm. Limited', 'EESubgroup 03 H-OT Elig>Daily Sche', and 'Status Active'. Below this, there are tabs for 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Person...'. The 'Benefits' tab is selected, showing a list of benefit plans on the left: 'Infotype text', 'Health Plans', 'Savings Plans' (highlighted with a green checkmark), 'Miscellaneous Plans', and 'General Benefits Information' (also with a green checkmark). On the right, there is a 'Period' section with radio buttons for 'Today', 'Curr.week', 'All', 'Current month', 'From curr.date', 'Last week', 'Up to Today', 'Last month', 'Current Period', and 'Current Year'. A 'Choose' button is at the bottom of this section. At the very bottom of the screen, there is a status bar showing 'RD0 (1) (201)', 'ssvaphrddedci', and 'OVR'.

18. You have completed this action.

### Result

You have enrolled the employee into the correct savings plan.

### Comments